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EU Fruits & Vegetables Trade Statistics - CY 2004 2005

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Report Highlights:

EU Fruits & Vegetables Trade Statistics - CY 2004

Includes PSD Changes: No
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EU IMPORTS AND EXPORTS OF FRUITS AND VEGETABLES MAIN ORIGINS AND DESTINATIONS. CALENDAR YEAR 2004

TOTAL EU TRADE

The EU-25 is a net importer of fresh and processed fruit and vegetables with a trade deficit of USD 12.2 billion in calendar year 2004, an increase of almost 1 billion USD from the EU-15 CY 2003 trade deficit. Due to enlargement, exports from the EU-15 to the 10 new member states are now included in the intra-EU trade statistics.

Total EU-25 imports of **fresh fruit and vegetables** (HS codes 07 + 08) amounted to 16.6 million MT in 2004, with a value of USD 15.8 billion. Total EU exports of fresh fruits and vegetables totaled 3.5 million MT, with a value of USD 4.8 billion. Ranked by value, the main supplier of fresh products is the U.S. (almonds, other nuts, dried grapes), followed by Turkey (hazelnuts, dried grapes, cherries), South Africa (fresh grapes, apples, oranges) and Costa Rica (bananas, pineapples). Each of these suppliers exports more than 1 billion USD to the European market. The main destinations for EU-25 exports are Russia (apples, pears, tomatoes), Switzerland (lettuce, oranges), U.S. (olives, peppers, mandarins) and Norway (tomatoes, apples, pepper, oranges).

EU-25 TOTAL IMPORTS & EXPORTS OF FRESH FRUITS & VEGETABLES (HS CHAPTERS 07+08) MAIN ORIGINS & DESTINATIONS (ranked by volume) JANUARY-DECEMBER 2004					
IMPORTS			EXPORTS		
Origin	1,000 USD	1,000 MT	Origin	1,000 USD	1,000 MT
United States	1,586,487	648	Russia	681,315	1,117
Turkey	1,495,470	941	Switzerland	677,491	491
South Africa	1,088,764	956	United States	356,497	165
Costa Rica	1,023,333	1,215	Norway	330,271	284
Ecuador	797,712	1,083	Algeria	112,120	209
Morocco	793,171	793	Canada	109,104	76
Chile	790,293	607	Egypt	106,412	370
Colombia	678,055	788	Croatia	102,415	172
Argentina	595,224	730	Japan	82,267	181
Israel	562,166	507	Romania	63,623	23
World	15,817,549	16,668	World	3,552,268	4,829

Source: Eurostat

EU 2004 imports of **processed fruits and vegetables** (HS code 20) totaled 3.9 million MT, with a value of 4.1 billion USD. Total EU 2004 exports of processed fruits and vegetables totaled 2 million MT, with a value of 2.9 billion USD. In 2004, major exporters of processed fruit and vegetables to the EU-25 were Turkey (nuts, cucumbers & peppers in vinegar, olives), Brazil (orange juice), China (tomato, asparagus, mushrooms) and Thailand (pineapples). The main EU processed fruit and vegetable markets are the U.S. (olives, artichokes, tomatoes), Russia (sweet corn, olives, peas, jam), Japan (processed tomato, jams, apple juice) and Switzerland (tomato, olives).

EU-25 TOTAL IMPORTS & EXPORTS OF FRUITS & VEGETABLES (HS CHAPTER 20) MAIN ORIGINS & DESTINATIONS (ranked by value) JANUARY - DECEMBER 2004					
IMPORTS			EXPORTS		
Origin	1,000 USD	1,000 MT	Origin	1,000 USD	1,000 MT
Turkey	829 583	339	United States	644 298	272
Brazil	788 261	1 028	Russia	369 354	282
China	501 074	608	Japan	209 154	153
Thailand	323 312	373	Switzerland	203 750	111
United States	186 038	145	Australia	109 982	74
South Africa	128 414	111	Saudi Arabia	105 885	110
Peru	116 194	57	Canada	99 511	54
Switzerland	107 647	255	Norway	66 296	44
Morocco	105 767	22	Croatia	56 289	45
Israel	89 665	98	Nigeria	43 095	34
World	4 076 847	3 908	World	2 924 714	2 010

Source: Eurostat

US/EU TRADE

EU25 (External Trade) Import Statistics From United States TOP-10 EU FRESH & PROCESSED FRUIT AND VEGETABLES JANUARY - DECEMBER 2004 (ranked by value)			
Commodity	Description	VALUE (1,000 USD)	VOLUME (MT)
IMPORTS			
0802 12	Almonds, Shelled	781 354	176 642
0802 31 thru 33	Walnuts, In Shell	147 971	58 261
0802 50	Pistachios, Shelled Or Not	110 620	26 407
0806 20	Grapes, Dried	80 446	50 124
0805 40	Grapefruit	73 156	96 929
0813 20	Prunes, Dried	63 454	29 871
0808 10	Apples, Fresh	45 410	37 242
2009 21 Thru 29	Grapefruit Juice	31 841	42 854
0802 90 20	Fresh Or Dried Areca 'Betel', Cola And Pecans	29 953	4 078
0713 33	Kidney Beans & White Pea Beans	29 519	25 949
2009 11 11 thru 19	Orange Juice	27 810	41 754

Source: Eurostat

Due to the heterogeneous nature of the different products, the ranking is classified by value instead of volume. The main imports from the U.S. are tree nuts (almonds, walnuts and pistachios), followed by dried fruits (grapes and prunes), grapefruit (fresh and juice) and fresh apples. Despite the increase of about 20% more consumers in the EU market since enlargement, the demand growth has been slow. EU imports of most commodities remain at the same level, with the exception of walnuts and apples, which noted an increase of 50 percent in volume. The most obvious reason for limited growth in demand has been the limitation of purchasing powers in NMS. This however is expected to increase, particularly in countries like Slovenia, Estonia or Slovakia.

EU25 (External Trade) Import Statistics From United States			
TOP-10 EU FRESH & PROCESSED FRUIT AND VEGETABLES			
JANUARY - DECEMBER 2004 (ranked by value)			
Commodity	Description	VALUE (1,000 USD)	VOLUME (MT)
EXPORTS			
2005 70 10	Olives	195 908	71 144 619 ¹
0709 60 10	Sweet pepper	84 884	24 316
0805 20 10	Clementines	70 431	51 882
2005 90 50	Artichokes	66 800	33 588
2002	Tomatoes (processed)	60 897	87 691
0702	Tomatoes (fresh)	46 602	16 979
2009 71 thru 79	Apple Juice	37 319	32 734
2007	Jams, Fruit Jellies, Marmalades Etc	33 345	11 171
0710 22	Beans (Frozen)	13 886	11 031
2003	Mushrooms	12 905	158

Source: Eurostat

Olives remain the top EU export, followed by sweet pepper, clementines, artichokes and tomatoes (processed and fresh). Most of these products are exported from the former EU-15; NMS do not contribute significantly to EU fruit & vegetable exports to the U.S. Moreover, there has been a noted decrease, both in volume and value, for clementines, peppers and fresh tomatoes.

¹ Kgn: Kilogram Drained Net Weight

MAIN COMPETITORS FOR TOP-10 PRODUCTS IMPORTED INTO THE EU JANUARY - DECEMBER 2004 (in Metric Tons)		
Product	Imports from U.S.	Competitors
Almonds, Shelled	176 642	none
Walnuts, In Shell	58 261	none
Pistachios	26 407	Iran (54 265)
Grapes, Dried	50 124	Turkey (179 438), Iran (40 176)
Grapefruit	96 929	Turkey (59 710), South Africa (50 266), Israel (50 163)
Prunes, Dried	29 871	Chile (12 274)
Apples, Fresh	37 242	New Zealand (213 746), South Africa (180 058), Chile (175 861), Brazil (122 925), Argentina (91 118), China (62 578)
Grapefruit Juice	42 854	Israel (44 821), Cuba (23 695)
Areca 'Betel', Cola And Pecans	4 078	none
Kidney Beans & White Pea Beans	25 949	Canada (132 971), China (84 030), Argentina (64 301)
Orange Juice	41 754	Brazil (989 557), Switzerland (119 871)

Source: Eurostat

With the exception of Canada and New Zealand, the U.S.' main competitors are countries that benefit from preferential import duties under the EU's Generalized System of Preferences (GSP), the Euro Mediterranean agreement (Israel) and the special situation of Turkey, as a candidate country in the European Union enlargement. Under the GSP system, in the case of non-sensitive products (pistachios, grapefruits), the custom tariff duties can drop to zero.

EU-25 TOTAL FRUIT AND VEGETABLES TRADE WITH U.S. JANUARY - DECEMBER 2004				
	IMPORT		EXPORT	
	MT	1,000 USD	MT	1,000 USD
Vegetables (fresh)	115 389	186 037	84 756	212 148
Fruit (fresh)	532 851	1 455 433	80 702	144 348
Fruit and Vegetables (processed)	144 629	131 053	272 171	644 298
TOTAL	792 869	1 772 524	437 629	1 000 794

Source: Eurostat

In 2004, total EU-25 imports of fresh and processed fruits and vegetables from the U.S. amounted to 792,869 MT, a volume equivalent to the EU-15 imports in 2003, but with a value of USD 1.77 billion, increasing 25 percent in value from 2003. EU exports to the U.S. dropped to 437,629 MT, a decrease of 24 percent compared to 2003 EU-15 data, although the value increased up to a billion dollar.

EU-25 IMPORTS FROM THE U.S. - BY MEMBER STATE (in Metric Tons)			
January-December 2004			
	Vegetables (Fresh)	Fruit (Fresh)	Fruit & Vegetables (Processed)
Netherlands	8,978	60,917	88,021
United Kingdom	31,676	107,607	13,103
Spain	33,888	77,071	1,393
Germany	5,499	85,149	5,738
Italy	10,324	44,276	26,289
France	12,375	57,353	4,637
Belgium	2,682	29,911	21,628
Sweden	2,860	15,812	7,292
Denmark	1,150	12,756	482
Greece	2,370	9,331	2,180
Poland	213	7,912	1,170
Luxembourg	32	7,746	-
Finland	383	6,472	297
Czech Rep.	280	2,767	476
Austria	54	1,437	1,343
Ireland	92	1,970	744
Hungary	742	776	1,146
Portugal	850	1,042	37
Slovakia	361	439	148
Cyprus	300	316	216
Lithuania	22	517	70
Estonia	146	433	29
Latvia	-	438	93
Slovenia	112	107	224
Malta	2	298	45
TOTAL EU-25	115,391	532,853	176,801

Source: Eurostat

EU-25 IMPORTS FROM THE U.S., MAIN CATEGORIES. JANUARY-DECEMBER 2004							
Commodity	Volume (Metric Tons)			Commodity	Value (1,000 USD)		
	2004	2003	% Change		2004	2003	% Change
Fresh Vegetables	7 264	7 596	-4%	Fresh Vegetables	6 203	9 142	-32%
Frozen Vegetables	1 256	2 867	-56%	Frozen Vegetables	1 560	3 722	-58%
Dried Vegetables	79 949	107 070	-25%	Dried Vegetables	77 212	88 488	-13%
Processed veget.	23 067	38 326	-40%	Processed veget.	27 955	36 058	-22%
Fresh Fruit	165 493	165 685	0%	Fresh Fruit	182 020	174 203	4%
Fresh Nuts	258 763	230 607	12%	Fresh Nuts	1 035 104	727 967	42%
Dried Fruit	80 634	80 997	0%	Dried Fruit	146 585	139 964	5%
Frozen/Pres Fruit	776	1 372	-43%	Frozen/Pres Fruit	1 726	1 897	-9%
Processed fruit & nuts	10 992	20 772	-47%	Processed fruit & nuts	21 887	31 063	-30%
Fruit juices	98 700	104 047	-5%	Fruit juices	106 166	104 512	2%

Source: Eurostat

EU-15 EXPORTS TO THE U.S. - BY MEMBER STATE (in Metric Tons)			
January-December 2004			
	Vegetables (Fresh)	Fruit (Fresh)	Fruit & Vegetables (Processed)
Spain	7 826	58 386	269 859
Italy	1 287	12 338	66 370
Greece	623	1 764	61 552
Netherlands	46 483	980	13 639
France	9 424	3 286	27 208
Germany	1 192	711	34 563
Poland	4 048	1 572	13 761
Belgium	12 344	106	5 854
Austria	2	-	8 829
United Kingdom	1 055	484	6 106
Sweden	22	154	2 970
Denmark	94	-	2 879
Hungary	261	-	2 471
Portugal	50	183	1 861
Cyprus	8	686	28
Lithuania	28	46	380
Ireland	-	-	272
Czech Rep.	1	-	123
Latvia	4	-	98
Slovenia	-	-	69
Finland	-	5	6
Estonia	2	1	5
Luxembourg	2	-	-
Slovakia	-	-	1
Malta	-	-	-
TOTAL EU-25	84 756	80 702	518 904

Source: Eurostat

EU-25 EXPORTS FROM THE U.S., MAIN CATEGORIES. JANUARY-DECEMBER 2004							
JANUARY-DECEMBER 2004							
Commodity	Volume (Metric Tons)			Commodity	Value (1,000 USD)		
	2004	2003	% change		2004	2003	% change
Fresh Vegetables	49,852	61,868	-19%	Fresh Vegetables	151,354	181,216	-16%
Frozen Vegetables	11,111	9,153	21%	Frozen Vegetables	14,104	10,643	33%
Dried Vegetables	1,095	2,065	-47%	Dried Vegetables	2,313	4,019	-42%
Proces. vegetables	134,748	128,365	5%	Proces. vegetables	398,624	370,725	8%
Fresh Fruit	53,936	74,192	-27%	Fresh Fruit	73,136	98,566	-26%
Fresh Nuts	2,990	3,093	-3%	Fresh Nuts	10,899	9,865	10%
Dried Fruit	5,080	3,351	52%	Dried Fruit	11,108	4,427	151%
Frozen/Pres. Fruit	14,461	26,177	-45%	Frozen/Pres. Fruit	2,853	3,916	-27%
Processed fruit & nuts	1,510	2,317	-35%	Processed fruit & nuts	15,589	25,858	-40%
Fruit juices	48,154	55,324	-13%	Fruit juices	73,753	68,159	8%

Source: Eurostat

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